1. Validation/Finalization of PolyU Scholars Hub record

The Hong Kong Polytechnic University

Department admins are responsible for validating the record drafts submitted by researchers. Each content type has its own workflow steps:



When the record can be 'published', you may tick the last step (**approved / validated**) of the workflow. Please note that all records would not appear in PolyU Scholars Hub portal until the record is finalized. (if the visibility is supposed to be "Public – No restriction")



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2.1 Authors and affiliations

Recognizing the correct contributors for publications/prizes/awards are essential in PolyU Scholars Hub, as all these records would be linked to researchers' profile. Records would be missing if mapped to a wrong contributor to the record.

Therefore, beware of the data accuracy when performing import matching.

For an author matched to **external person**:

- If all affiliations are external, no need to change anything

Contributors and affiliations 👩	
Contributors * Chan Tai Man , Author External person SUNY Buffalo	Edit
External organisation: Academic	

- If one affiliation is PolyU, it could be 1) Name mismatch, or 2) ex- or non-PolyU person, please investigate

Edit

Chan Tai Man	, Author	
External person		
🞢 The Hong Kong Polytechnic University		
External organ	isation: Academic	

For an author matched to **internal PolyU staff**:

- Make sure the staff is from the correct department, as there may be PolyU researchers with identical name



→ If person with incorrect affiliation appears, click 'edit'

	Edit person			
Chan Tai Man Internal person Name and role on the	e research output	Change person Replace Make external	•	Select 'Replace'
First name	Last name #	k		
Tai Man	Chan			
Role *				
Author 🔻				

Find person to replace with
🔾 Chan Tai Man 🛞
21 - 30 / 100+
Chan Tai Man Department of Building and Real Estate - Research Assistant Professor Academic (Staff)
Chan Tai Man School of Accounting and Finance - Former PhD (Student)
Chan Tai Man Department of Building and Real Estate - Former PhD (Student)
Chan Tai Man Department of Applied Biology and Chemical Technology - Visiting Fallow, Former Visiting Scholar (Staff)

- If affiliation does not have the department name, add it back by clicking "edit"

Chan Tai Man Author Internal person	ytechnic University	Edit
Organisational unit: L	Iniversity	
Chan Tai Man Internal person Name and role on the research First name	Change person Change person Change person Change # Chang	
Role * Author Affiliation on the research output	ut	You could simply tick the box if the system suggested the correct department affiliation here
 Department of Land Surveying and The Hong Kong Polytechnic University Affiliate to another organisational Affiliate to an external organisation 	nd Ceo-Informatics (9/03/18 - 24/06/: ersity unit	If affiliation not suggested, click here and search for the respective organizational unit
4	Cancel Update	

- If affiliation is external, make sure only keep parent-level info
- If no affiliation is PolyU, it is most likely published outside PolyU. Leave it as it is but only keep parent-level info

For detailed practices and instructions, you may refer to **Manual 2d - Insert Research Output**.

PolyU Scholars Hub content management for faculty administrator

2.2 Conference presentation and optional items

Conference presentation: UGC required that a conference presentation must	Keywords 👩		
specify whether it's by invitation or not.	NATURE OF CONFERENCE PAPER PRESENTATION		
If a research output is of this type, make sure this is selected. This is an optional field as it applies to only one research output type.	There are no associations Add nature of conference paper presentation		
Optional items:			
You may want a staff to provide supporting	Documents and links 👩		
documents as a proof of his submission, e.g. a photo of a prize he received.	Documents Add document		
This can be uploaded in the "Documents and links" section. Files uploaded this way are for backend use	Links Add link		

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This can be uploaded in the " section. Files uploaded this way are for backend use only.

3. Email & System Notifications

You can configure PolyU Scholars Hub to alert you on any pending tasks.

3.1 Email notifications

You could change your email settings and preferences in PolyU Scholars Hub, by clicking your NetID displayed near the search bar.

	٩	Accessibility 🚽 👤 NetID 🗸
	Chan Tai Man User profile	۲
Profile	Email settings	
Email settings	Select how often you want to receive emails for the follow	ving messages.
Message settings	Email message	Email frequency
Task settings	Activity - Multiple messages	Some emails
Trusted users	Application - Comment added	Emails are sent instantly
	Author collaboration – Multiple messages	Some emails
	Award - Comment added	Emails are sent instantly

You may edit the **email frequency** in the below display to decide how frequent you would want to receive email from each workflow of PolyU Scholars Hub editing activities.

Research output	
Notification	
Comment added	Emails are sent instantly
Editorial task	
Claim/disclaims	Emails are never sent
Workflow: Entry in progress	Emails are never sent
Workflow: For approval - Creation/forwarding	Emails are never sent 🔹 👻
Workflow: For approval - Returning	Emails are never sent
Workflow: For re-validation - Returning	Emails are sent instantly
Workflow: Approved - Forwarding	Emails are sent daily
Workflow: Approved - Returning	Emails are sent weekly
	Emails are sent monthly
Student thesis - Multiple messages	Emails are sent quarterly

Here is our recommendation, however:

- **DO NOT get alerts on the "Entry in progress"** workflow trigger unless you really want; otherwise you will get alerts in every record saved in draft mode
- If you just started using PolyU Scholars Hub, set it to at least once a week for email alerts. Then gradually relax the frequency once you are more familiar with the platform

3.2 System notifications

- System notifications refer to pending task displays on your PolyU Scholars Hub workspace
- In the "Task settings" part, you could also have similar configuration as the previous "Email settings" section.

Profile	Task settings		
mail settings	Select which tasks you want to show in the right hand side of the workspace.		
Message settings	Task	Show	
Fask settings	Activity – Multiple tasks	Some tasks	
rusted users	▶ Press/Media - Multiple tasks	Some tasks	
	Prize – Multiple tasks	Some tasks	
	▼ Research output		
	Editorial task		
	Workflow: Entry in progress		
	Workflow: For approval - Creation/	forwarding	
	✔ Workflow: For approval - Returning		
	✓ Workflow: For re-validation - Return	ning	
	Workflow: Approved - Forwarding		
	Workflow: Approved – Returning		

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Similar to email notifications, you may select the tasks that you would like to receive notifications for. Task notifications would be shown on the right-hand side of your PolyU Scholars Hub workspace on the main page. (see below) **It is strongly recommended to set 'show task' so that available updates could be viewable on the main page.**

	Chan Tai Man User profile	۲
Profile Email settings	Task settings Select which tasks you want to show in the right hand	d side of the workspace.
Message settings	Task	Show
Task settings	Activity - Workflow: Entry in Progress	Show task
Trusted users	Person - Curriculum Vitae with new content	Show task
	Press/Media - Workflow: Entry in Progress	Show task
	Prize - Workflow: Entry in Progress	Show task
	Research output – Multiple tasks	Some tasks
	Student thesis - Workflow: Entry in progress	Show task
	Q Ac	cessibility 🗸 👤 NetID User switch 🗙

Activities -=	415 + Add content	
Editorial work for journals	(184)	
Invited talk	102 Tasks	
Organizer / committee member	48	
Office holder / member of other professional body	22 281 Research outputs are	
Consultancy	16 waiting to be pushed to r	next
Office holder / member of committee	14 workflow step	
Oral presentation	11	
Review of books, other publications, or software	8 1 Prize is waiting to be put	1 Prize is waiting to be pushed to next workflow step
Examination	3 to next workflow step	
Academicians	3	
More	16 Press/Media are waitir	ng to
+ New	be pushed to next workflo step	ow
🛱 Press/Media 🕞	524	
Press/Media	524	
+ New		
Awards →=	0	
Facilities/Equipment =	0	

Note: Click ► to expand the list and amend if needed

- Notification: something related to you is changed in Pure
- Personal task: you are asked to make some changes on a record related to you in Pure

Research output

Notification

Comment added

Person association changes

Personal task

✔ Workflow: Entry in progress